



**Better Buildings Residential Network
Peer Exchange Call Series:
*The Envelope Please... Lessons from Home
Performance with ENERGY STAR Contractor of the
Year Winners***

May 24, 2018

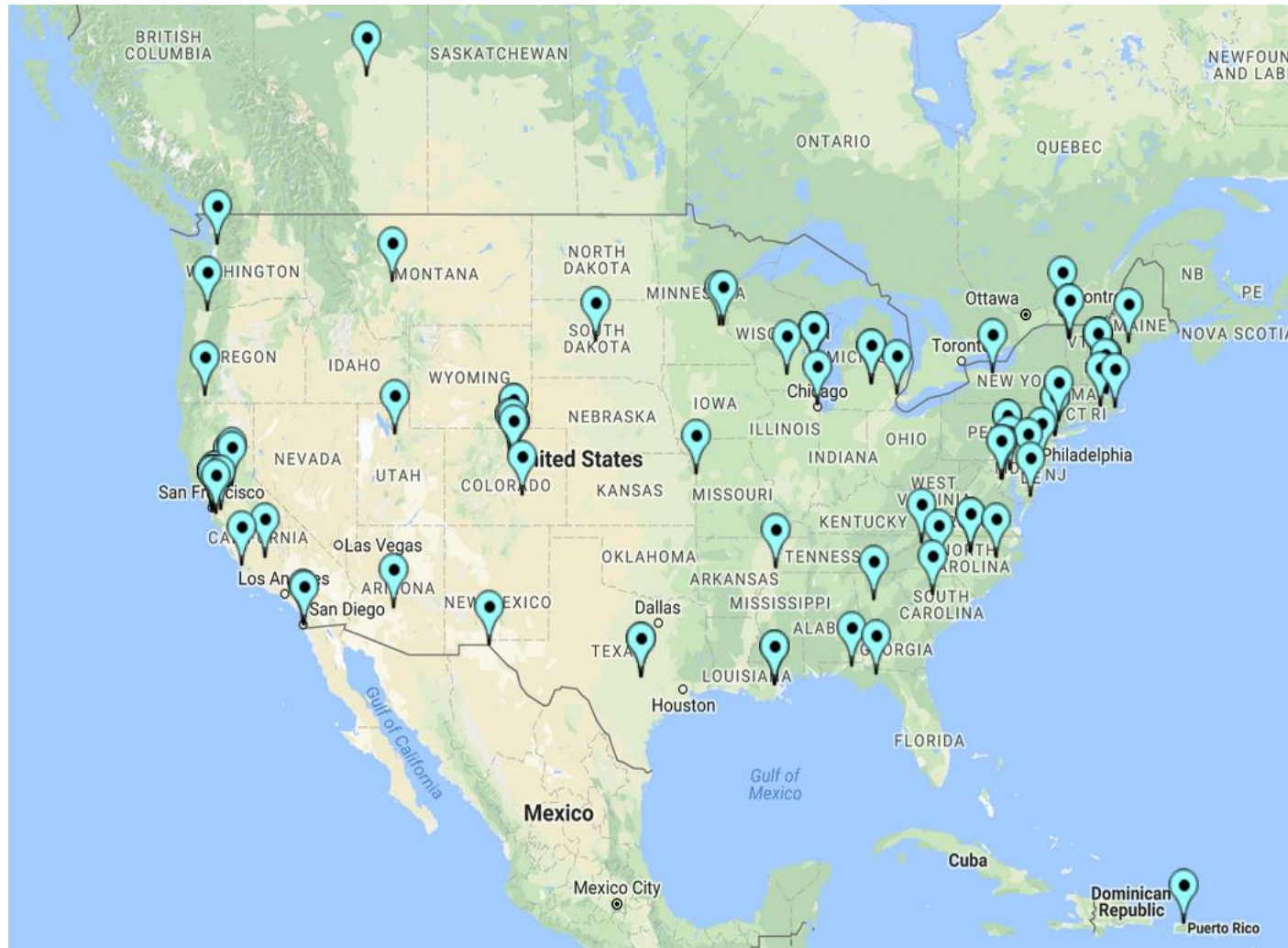
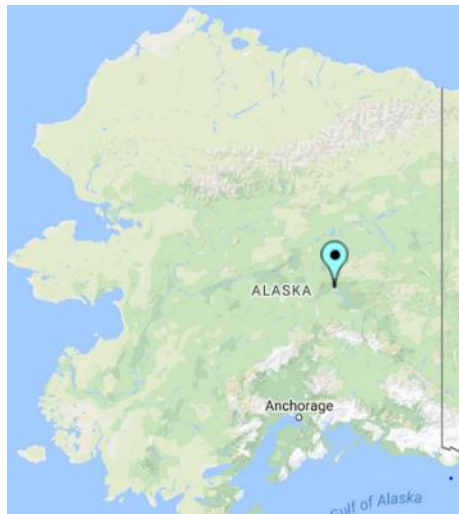
Agenda and Ground Rules

- Agenda Review and Ground Rules
- Opening Poll
- Residential Network Overview and Upcoming Call Schedule
- Featured Speakers:
 - **Jeff Flaherty**, Wise Home Energy
 - **Elena Chrimat**, Ideal Energy
 - **Jason Dispenza**, Edge Energy
- Open Discussion, Closing Poll, and Announcements

Ground Rules:

1. **Sales of services and commercial messages are not appropriate** during Peer Exchange Calls.
2. Calls are a safe place for discussion; **please do not attribute information to individuals** on the call.

Call Attendee Locations



Better Buildings Residential Network

Join the Network

Member Benefits:

- Recognition in media and publications
- Speaking opportunities
- Updates on latest trends
- Voluntary member initiatives
- Solution Center guided tours

Commitment:

- Members only need to provide *one number*: their organization's number of residential energy upgrades per year

Upcoming calls:

- June 14th: How Health Is Reshaping the Residential Energy Efficiency Field
- June 28th: Renters and Residential Energy Efficiency

Peer Exchange Call summaries are posted on the Better Buildings [website](#) a few weeks after the call

For more information or to join, for no cost, email bbresidentialnetwork@ee.doe.gov, or go to energy.gov/eere/bbrn & click Join



Jeff Flaherty
Wise Home Energy



Wise Home Energy

Knowledge, Experience and a Commitment to Results

Home Performance Contractor of the Year 2018

Founder/President: Jeff Flaherty





Market Rate

Multi-Family

Low Income

W.H.E. works in all types of residential housing.

We emphasize the final product over the final profit.

We try to guide our clients to utilize any and all efficiency programs available to them.

- Market Rate
- Assisted Home Performance w/ Energy Star
- Empower New York
- Weatherization
- NYSERDA Homes and Community Renewal
- Low Interest Financing for Energy Efficiency
- Rochester Safe and Efficient Home Initiative
- HEAP / HERR
- Utility Rebates



Continuing Education

BPI Certificates In:

- Building Analyst
- Envelope Professional
- Heating Professional
- Multi-Family
- Manufactured Housing

Install Team Training:

- Weatherization Boot Camp
- Clean & Tune Procedures (Heating)
- Advanced Airsealing
- Home Health and Safety
- Fundamentals
- Manufactured Housing

Additional Training:

- In-House mock building structures
- Manufacturer trainings (IAQ, Ventilation, Hydronic Systems, etc.)



Whole House Approach, Testing and Tuning

“If you don’t test, you don’t know”

“If you don’t use it, you loose it”

We use our auditing equipment



What we test for and what we fix

IAQ tracking, our newest service

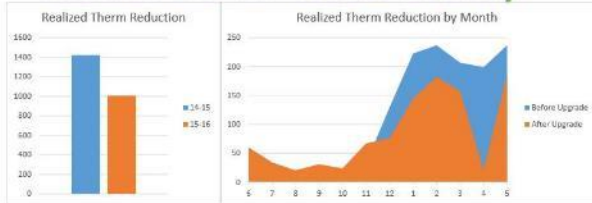


Blower Door Testing



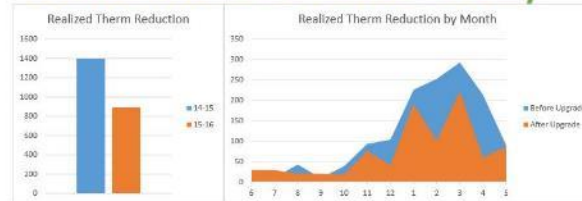
Case Studies / Tacking Results

Eduardo B. Case Study



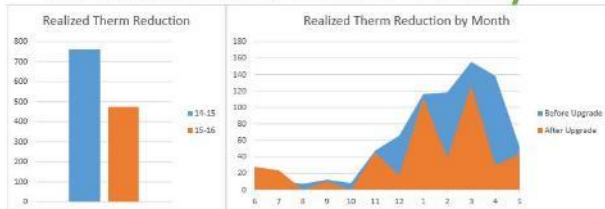
Eduardo Saved \$438 Last Year
This Equals A 29% Reduction
Adjusted For The Mild Winter,
Eduardo Can Expect To Save \$261 Each Year Going Forward

Willie Mae C. Case Study



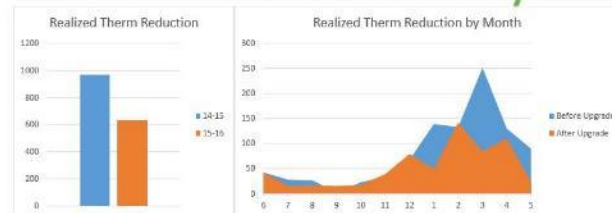
Willie Mae Saved \$534 Last Year
This Equals A 36% Reduction
Adjusted For The Mild Winter,
Willie Mae Can Expect To Save \$377 Each Year Going Forward

Sharon M. Case Study



Sharon Saved \$300 Last Year
This Equals A 38% Reduction
Adjusted For The Mild Winter,
Sharon Can Expect To Save \$206 Each Year Going Forward

Melvin R. Case Study



Melvin Saved \$348 Last Year
This Equals A 34% Reduction
Adjusted For The Mild Winter,
Melvin Can Expect To Save \$236 Each Year Going Forward

Wise Home Energy's **commitment to results** is integral to our success as a company.

Many of our clients offset project costs by realized energy savings.

State energy reduction programs are considering "pay for performance" based incentives.

We believe tracking results is "actualized" quality control.

The Proof Is Possible Tour



- Partnered with Corbet Lunsford to bring his “tiny lab” to Upstate NY
- Tour focus was community education about home performance
- Emphasized testing and diagnostics
- Shot an episode of “Home Diagnosis” A PBS TV series to air this winter



Community Outreach/Engagement

Webster Fireman's Parade



Corporate Challenge 5K

- Rochester Refugee Resettlement Services
- Pathstone Corporation / Workshops
- Energy Efficiency Education Meetings
- Farmers Markets
- Project Heart Share

ABC Luncheon



Rochester Home Show

St. Patrick's Day Parade



HOME PERFORMANCE ENERGY ST OR OF THE YEAR

Awards / Partner Support

We value the relationships we have made with our local and national partners, without working with them we would not have been able to excel as a Home Performance Company:

- ▶ BPI
- ▶ NYSERDA
- ▶ Efficiency First
- ▶ Action for a Better Community
- ▶ Pathstone Corporation
- ▶ Rochester Refugee Resettlement Services
- ▶ NYSWADA
- ▶ Proof Is Possible Tour / TV Series



Three Main Take-Aways

- ▶ **Training** - Continuing education instills a confidence and knowledge in our team members that in turn benefit the company. We are not afraid to invest in our employees education in fear that they may end up leaving to start their own business.
- ▶ **Testing** - Testing is knowledge. We run diagnostics in every home we work on, typically before and after installation. This allows us to provide the proper recommendations as well as ensure we did what we set out to do. It also allows our to have clients to have confidence in us as a company.
- ▶ **Willingness to Fail** - By this we mean a few things. We are accepting of our mistakes. We are not afraid to test a home and not achieve our goals, because we will go back, fix it, and learn from it. We are also not afraid to loose profit on a job if it means doing it right. We believe a commitment to results should be the corner stone of a successful home performance company.

....And remember a catch phase can go along way.

Make the Wise Choice!

Thank You



Elena Chrimat
Ideal Energy

Lessons from Home Performance with ENERGY STAR Contractor Winners

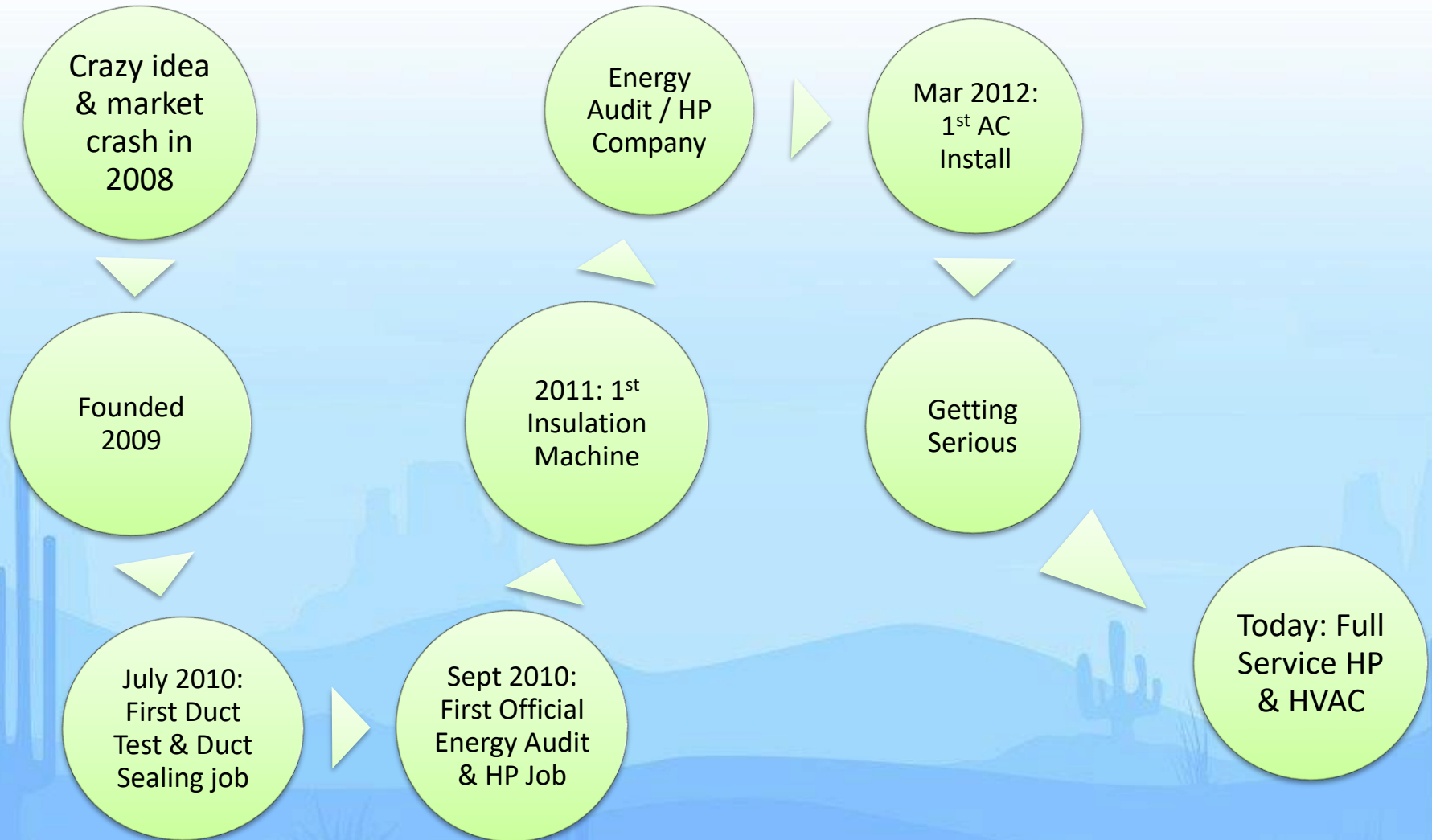
About Us



Who We Are

- We do true home performance (vertically integrated)
- We care and we do what's right
- We understand that mistakes might happen, but how we handle those mistakes is what separates us from our competition
- We don't stop until the job is done 100% right, even in the unfortunate event where we might lose money on a job
- We take care of our employees

Company History



Two Core Values that Have Helped Us Succeed:

- 1) ***No one** in our team is above the attic*
- 2) *We will absolutely **never** sacrifice quality for growth*

Organic, Hands-on Growth

What if you just don't have the cash to go all in from day 1 (or year 2, 3, 4, etc...)??

No debt, means a lot of hard, hands-on work... but much lower risk.

Be Open – Adapt to Response and Adapt Fast

- Make constant, calculated changes, until you've reached optimal performance
- Sometimes, you'll be wrong...
- Realizing and admitting it is the first step, because if you don't, you will never succeed...

**HUMBLE
YOURSELF
OR LIFE
WILL DO IT
FOR YOU**

Your Brand: Know Who You Are



You Can't Do It All Yourself...

Employees make or break your company...

- Treat them well
- Train them...
- Train them...
- Keep training them!



- Letting go is hard, but it can be done if everyone is properly trained!

Treat Your People Like You'd Want to Be Treated

"Be nice to the little people when you move up the ladder, as you may see them again on the way down"



Your Team is What Makes You Successful



Stay Realistic

- Put yourself back in the shoes of your people every once in a while to bring you back to reality



Don't Lose Sight of Your Vision

- Bring it back...
 - WHY do you do what you do??
 - Certainly not because it's easy...we'd all be doing something else if this were true!
 - There's a bigger picture, right?
 - The more money, the better, right?
 - Wrong...
 - Money doesn't mean anything if your values are sacrificed
 - Make money, but do it right!

Take Care of Your Customers No Matter What

Every single point of contact you have with your customer, will shape your relationship and potential for a referral, review or repeat business.



Track Everything You Can

- You don't know what you don't track
- You can't reward what you don't know
- How do you know you're investing properly if you don't track things?
- How do you know what your team is doing if you don't track your team?
- How do you know if you have the right people in the right positions if you don't track things?

If You Don't Track Yet, Start with Some Simple, Basic Stuff...

- Conversion rate
- Call backs
- Average job
- Revenue per man hour



Three Lessons:

1. You can't do it all yourself...employees make or break your company
2. Don't lose track of your vision during growth (what's the reason behind why you do what you do)? Define this and make sure everyone in your company is on board
3. Track everything you can

Questions?

Comments?

Elena Chrimat

elena@idealenergyaz.com



Jason Dispenza
Edge Energy



EDGE ENERGY

Efficiency | Weatherization | Solar

Brief Overview *of our* Company & Services

May 2018



SUNPOWER

ELITE DEALER

Table of Contents

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2. **Company Achievement and Successes**
3. **Business Strategies - Core Capabilities**
4. **Products & Services**
5. **Past Performances**
6. **Customers**
7. **Expansion Opportunities**
8. **Historical & Projected Financial Performance**



Executive Summary

EDGE Energy is licensed as both an electrical contractor and general contractor in MD, DC, and VA.

The Company was founded in 2006 to perform energy services in homes and businesses. Since the beginning, we have employed energy raters, auditors, and project managers to work with building owners, builders and developers, the DOE, regional and State Governments, and County Code offices doing energy audits, green building labels, clearance testing, Quality Assurance, in addition to the engineering, installation, and commissioning of advanced energy systems.

We integrated vertically as a "performance contractor" - because we use data to prove and verify the results of our projects.

In our commitment to craftsmanship and building a guild of highly trained installers, we continue to employ all of our own technicians who can perform the many types of energy retrofits we offer.



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Efficiency | Weatherization | Solar

Executive Summary

In 2009, we installed our first Solar PV system and also began working with the MD State Dept of Housing (DHCD) on low and moderate income housing programs.

We now employ over 50 people and maintain a reputation in the area as an Elite installer of Solar PV (Sunpower) and other energy systems in homes, businesses, and multi-family construction projects.

We are optimization experts and we collect building data to model savings of every proposed project, and we stand behind our results.

Active Contractor & Tradesman Licenses:

- General Contractor - MD, VA, DC, NJ, DE
- Electrical Master - MD, VA, DC
- HVAC-R Master - MD, VA

In process Licenses:

- Plumbing Master - pending Q3/Q4 2017 (MD, DC, VA)
- General - NC, SC, FL, MA, CT



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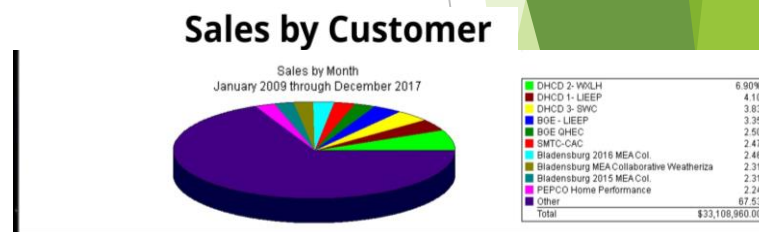
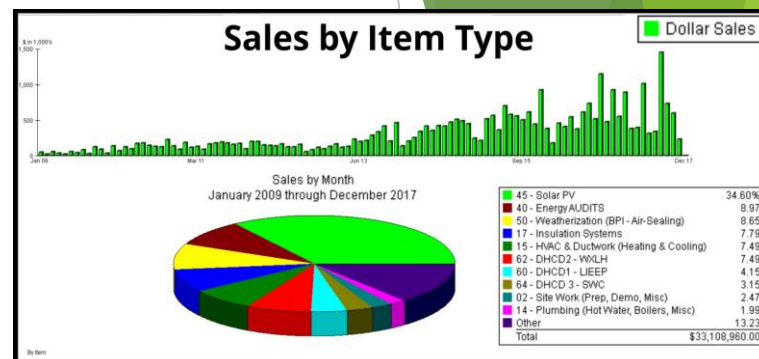
Company Highlights and Successes (thru 12-31-17)

Energy Efficiency & Consulting

- Over 10,500 BPI-certified Home Energy Audits,
- 216 ENERGY STAR-certified New Homes, & 118 HERS Ratings for EEMs
- 34 Commercial BPI Multi-Family and ASHRAE Level II or III audits
- Over 7,500 Quick Home Checks (QHECs) in Maryland

Energy and Performance-Based Projects

- Over 5,500 whole-home HPwES retrofit projects
- 29 commercial energy ECM retrofit projects
- Track record with State, DOE, Utility, and neighborhood programs:
 - 21 Utility, County, and State Office Energy Auditing & Weatherization Contracts
 - 13 Non-Profit or Neighborhood bulk purchase programs
- Over 550 residential Solar PV systems (over 3,575 kW),
- 17 commercial PV systems (totaling just over 1120 kW),
- 1 small wind turbines at Hagerstown Community College
- 23 Solar Hot Water systems,
- 12 commercial EV charging stations,
- 8 Geo-thermal systems,
- 1 micro-CHP system



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History of EDGE

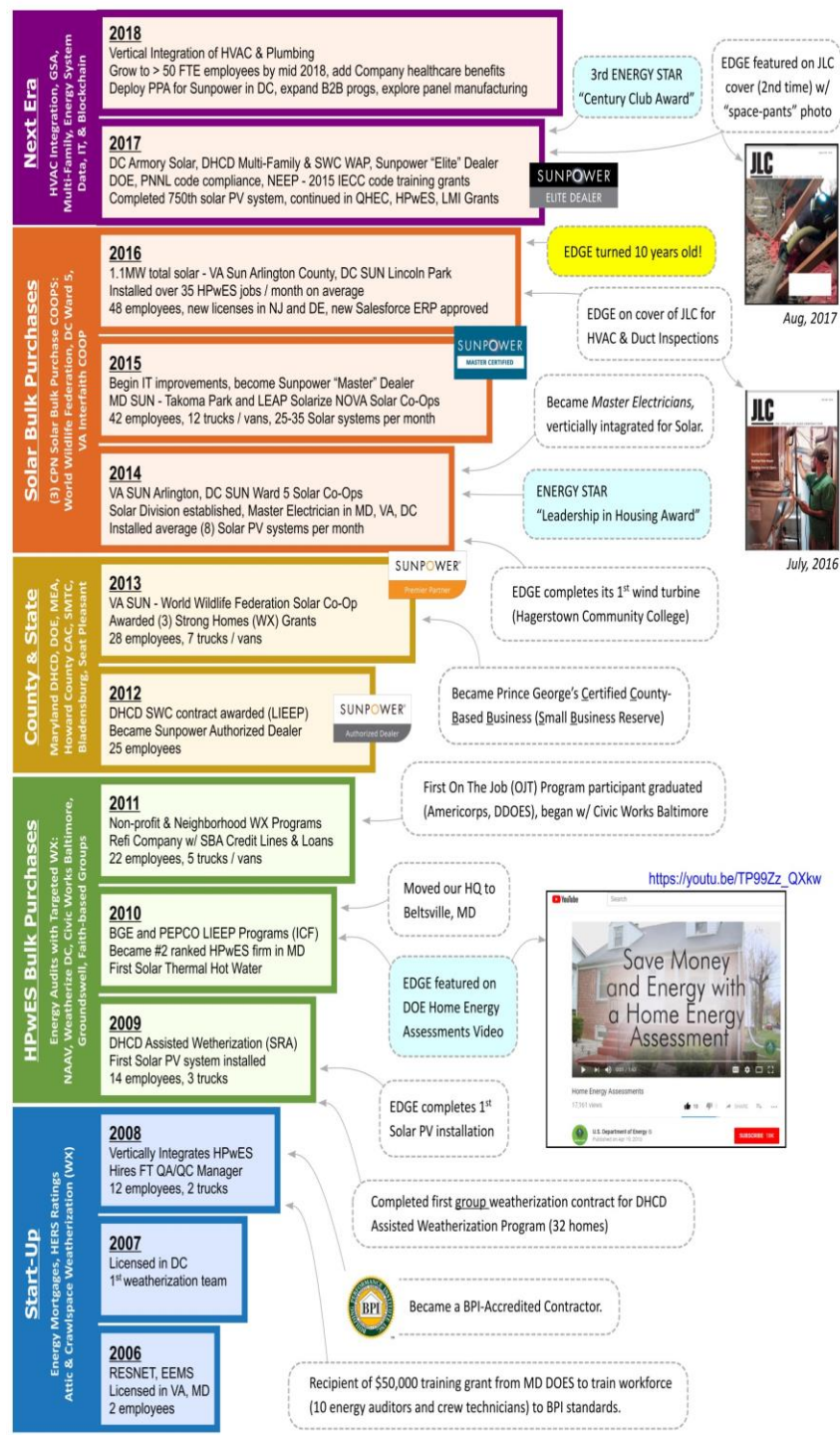
Experienced General Contractor
w/ Government, Commercial and
Residential energy programs

Certified Small Business in
Prince George's County, MD
SBR-CBBC

In-House & Affiliate OJT,
Safety, and Craftsmanship
Training Programs

Certified SBA, and backed by SBA
contract and credit lines and loans

Vertically Integrated w/
HVAC, ELE, PLMB



Core Competencies and Capabilities

- **Energy Audits and Ratings** - Comprehensive and thorough projects, performed by experienced, certified staff using state of the art equipment and procedures. Energy retrofits. Residential and commercial. Single and multifamily applications.
- **Green Building** - Residential energy services, sustainable and energy efficiency designed remodels and additions. Energy labeling: LEED, NAHB, UGBC, ENERGYSTAR. Energy consulting.
- **Housing Rehabilitation** - Lead, Mold, Asbestos Remediation, drywall repair, carpentry, painting.
- **Solar PV** - Residential, commercial, municipal, governmental. Biggest system to date 365 kW. Experience with carports, ground-mount, roofs of all types. More than a dozen Solar PV bulk purchases (co-ops) of 40+ homeowners each. SunPower Elite installer.
- **HVAC/R** - Safety repairs, tune-ups, recommissioning, ductwork design and performance, combustion safety diagnosis.
- **Geothermal** - History of residential systems, have not done commercial.

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Core Competencies and Capabilities

- **Microgrid** - Design, consulting on diverse types of generation and storage solutions including batteries, ice, thermal water.
- **Combined Heat and Power (CHP) aka Co-generation** - EDGE is a licensed and certified servicer and dealer for Marathon Engine Systems, producer of 4kW Ecopower CHP units that can be combined for commercial applications in strings of two or four.
- **Solar Hot Water** - Residential and commercial roof mount systems, assisted boilers.
- **Wind Power** - Small scale wind systems up to 25 kW, land-based systems only, can integrate into microgrid designs.
- **Electric Vehicle (EV) Charging Stations** - Turnkey job with master electrical, concrete curb work, stripe painting, signage and communicating credit card payment systems.
- **Optimizations** - Designing simple solutions to complex projects with advanced energy auditing and computer simulations of projects post remediation.



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Experienced **Turnkey EPC Contractor**

EDGE Energy can perform all aspects of the project process. We are not a pass-through contractor: we provide substantive leadership, program management, and technical oversight that ensures high quality and successful installations consistently meeting or exceeding applicable codes and best practices. We are vertically integrated with master installers, foreman, and engineering PM's on staff.

- **Engineering** - EDGE performs all appropriate functions for a repeatably high-quality professional job.
- **Procurement** - As part of our solutions we obtain the most cost-effective material (American-made where possible) when buying goods and services. We have special manufacturer relationships in solar and co-generation areas.
- **Construction** - With our industry certified in-house staff of trades, crafts, technical specialists and administration, we perform the project process end-to-end from planning, design, scheduling, permitting, licensing and commissioning.



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Past Performance - *Example Past Projects*



**Easter Seals Child Care Facility Falls Church VA
Solar PV 36 kW 2013**



**Prince George's County Permit Office
Six EV car charging stations, ramps, curbs, striping 2016**



**Hagerstown Community College
Wind Turbine 25 kW 2014**

Past Performance - *Example Past Projects*



**Belle Grove Historic Property Middletown VA
Commercial Energy Audit 2010**



**PG County Animal Shelter Upper Marlboro
MD Solar PV 40kW 2015**



**Kentland Community Center Landover MD
61.2 kW Solar PV 2016**



**Prince George's County Government offices
Solar EV Charging Carport Largo MD**

Past Performance - *Multi-Family / Commercial Projects*

EDGE is an awarded ENERGY STAR contractor that continues to be distinguished by its effective Project Management support from inception to completion.

In 2016, EDGE was selected by DHCD to support new initiatives in Commercial Projects by providing affordable energy solutions, high performance work, great customer service, and a safe job site for crew and customers.



Past Performance:

Commercial &
Governmental
Customers,
Partners, Projects



(2017) - BGE & SMECO - Quick Home Energy Check-Ups (QHEC)
(2017-2018) – Multi-Family CIF - Maryland Department of Housing (DHCD)
Commercial Construction Management and Energy Auditing
(2015-2017) – Residential CIF - Maryland Department of Housing (DHCD)
Rehabilitation, Lead, Mold, Asbestos Remediation Programs
(2015-2017) – SWC LIEEP - Maryland Department of Housing (DHCD)
Statewide Weatherization Contractor (SWC)
(2016) - LMI Healthy Homes & Community Legacy Combo Grant
Town of Bladensburg
(2015-2017) – DOE / PNNL Code Compliance Testing of IECC 2015 codes
(2016) - BGE & SMECO - Quick Home Energy Check-Ups (QHEC)
(2015) - LMI Healthy Homes & Community Legacy Combo Grant
Town of Bladensburg and Town of Takoma Park
(2015) - BGE & SMECO - Quick Home Energy Check-Ups (QHEC)
(2012-2015) - Maryland Department of Housing (DHCD)
Statewide Weatherization Contractor (SWC), EmPOWER, RGGI, DOE
funding
(2012 - 2014) - Bladensburg – Collaborative Weatherization Grant(s)
(2014) - PEPCO Quick Home Energy Check-Ups (QHEC)
(2013) - BGE Quick Home Energy Check-up Program (QHEC)
(2011-2014) - Southern MD Tri-Counties (SMTC) – CAC – WAP
(2010 - 2012) - Howard County CAC - WAP
(2011 - 2012) - BGE – LIEEP
(2011 - 2012) - PEPCO – IIEEP
(2011 - 2012) - Delmarva - IIEEP
(2011) - National Association of American Veterans (NAAV)
(2009) - DHCD “Assisted Weatherization”
ARRA Funding



Past Performance:

Community Solar & Non-profits

2017

- Cecil County Co-op –Solar Bulk Purchase (Solar PV on 28 homes)

2016

- Potomac Solar Co-op – Solar Bulk Purchase (Solar PV on 44 homes)
- Takoma Park Co-op – Solar Bulk Purchase (Solar PV on 52 homes)
- DC Lincoln Park Solar Co-Op – Solar Bulk Purchase (Solar PV on 47 homes)

2015

- VA Arlington County Solar Co-Op –Bulk Purchase (Solar PV on 37 homes)

2014

- Virginia Solarize – Solar PV Bulk Purchase (Solar PV on 18 homes)
- VA Interfaith Solar Coop – Solar PV Bulk Purchase (Solar PV on 42 homes)
- DC Ward 5 – Brookland – Solar PV Bulk Purchase (Solar PV on 38 homes)

2013

- World Wild Life Federation – Solar PV Bulk Purchase (Solar PV on 112 homes)
- Retrofit Baltimore – Civic Works (EA + WX on 142 homes)

2012

- Strong Homes RFP - Montgomery County and Howard County (HPwES on 36 homes)
- Three Oaks Townhomes (Silver Spring, MD) (HPwES on 17 homes)
- Bethesda, MD Strong Homes Project (HPwES on 13 homes)

2011

- Capitol Hill (District of Columbia) (HPwES on 18 homes)

2010

- Small Town Energy Program (STEP) (HPwES on 12 homes)



Company Financials: Financial Capacity

- **Working Capital** - \$650,000
- **Credit lines** - Primary SBA loans and credit lines at Sonabank (McLean, VA)
 - \$750,000 - Line to support DHCD state contract work
 - \$1,000,000 - Business credit line for residential and commercial work
- **Vendor / Supplier credit lines** - greater than \$850,000
- **Bonding rate** - 3% up to \$750,000 project; \$2.5M aggregate
- **Insurance Carriers** - New York Marine, Lloyds of London, Selective auto (\$6M)
- **Experience Modification Factor (EMR)** - Worker's Compensation Insurance rate depends on safety rating. EMR recently improved (reduced) to 0.87.
- **DUNS number** - 012513270



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Affiliations

- Building Performance Institute (BPI) Accredited Contractor
- Residential Audits (BPI, American Society of Heating, Refrigeration and Air Conditioning Engineers ASHRAE)
- Ratings and Certifications - Residential Energy Services Network (RESNET), Home Energy Rating System (HERS)
- National Association of Home Builders (NAHB)
- Commercial/Industrial Energy Audits & Assessments (Air Conditioning Contractors of America ACCA, ASHRAE)
- Zero-Energy Home Design and Energy Conservation Measures ECM
- Builder and Sub-Contractor Training on ENERGY STAR and related programs
- International Code Council (ICC)
- Prince George's County certified County Based Business (CBBC)
- Maryland DC Virginia - Solar Energy Industries Association (MDV-SEIA)
- North American Board of Certified Energy Practitioners (NABCEP) Solar installer and sales since 2009
- Technical Advisory Committee (TAC) for Northern Va Local Energy Alliance Program (LEAP) HPwES
- United States Green Building Council (USGBC)
- International Energy Conservation Code (IECC)
- National Comfort Institute (NCI)
- Better Business Bureau (BBB) Member since 2006
- EPA Lead Renovation, Repair and Painting (RRP)



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Taking EDGE Energy Into the Future!

- **New Home Construction and Development** - Energy efficient and sustainable design and construction practices to build Zero Net Energy (ZNE) homes. (20xx-20yy)
- **Microgrids** - Larger scale multi-disciplinary projects and collaborations. (2017)
- **Geographical expansion** - To neighboring Atlantic seaboard states (MA, CT, NC, SC, FL). (20xx-20yy)
- **Manufacturing and Assembly** - Working as SunPower Elite dealer in a position to perform finished assembly, testing, packaging to create a 50 MW production facility in Prince George's County. (2018-2019)
- **International Projects** - Central America (2017)
- **Expansion of Financial Services** - Energy Efficient Mortgages, Solar PPA and lease servicing, SREC brokerage and aggregation. (2017-2018)



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EDGE Energy – What We Believe

Know Your Customers - Make them a “Hero”

Every Customer Is Different – must demonstrate unique utility

Provide Fast Service and Communications

Listen to all Suggestions and Feedback

Make Yourself Available – Reward Personal Touches

Be Proactive – Be Safe – Be Mindful – Be Courteous - Be Loving

Measure Success By Measuring Your Customer’s Success

Focus On What Works, Sound Science, and Accurate Models

Open Doors - Behind-the-Scenes reviews, videos, our processes



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EDGE Energy Team



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Three Take-Aways

- Construction is hard, safety is paramount, clients are demanding, doing the right thing (all the time) is expensive.
- “Performance-based” -- in your projects/contracts, in your worker retention/bonuses, in your marketing/community
- Scaling up requires financial wherewithal, good banking/SBA relationships, good reputation, and computer/internet/CRM mastery





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Thank You!



Jason Dispenza

President

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EDGE Energy

888-586-3343

www.edge-gogreen.com

Upcoming Seasonal Messaging Opportunities

Now is the time to start planning energy efficiency messaging!

August and September are Back-to-School season

 **Back to School and Saving Energy at Home**

U.S. DOE's Energy Saver

Teaching Kids So They Can Teach Us

Efficiency & Conservation, Energy & Environmental Marketing, Environmental Issues

Shelton Group

Health in Buildings for Today and Tomorrow: Making Connections

- This interdisciplinary event brings together the health and buildings communities to accomplish common goals.
 - July 19 – 20
 - NIH Campus Natcher Center



Explore the Residential Program Solution Center

Resources to help improve your program and reach energy efficiency targets:

- [Handbooks](#) - explain *why* and *how* to implement specific stages of a program.
- [Quick Answers](#) - provide answers and resources for common questions.
- [Proven Practices](#) posts - include lessons learned, examples, and helpful tips from successful programs.
- [Technology Solutions](#) **NEW!** - present resources on advanced technologies, **HVAC & Heat Pump Water Heaters**, including installation guidance, marketing strategies, & potential savings.



<https://rpssc.energy.gov>

Thank You!

Follow us to plug into the latest Better Buildings news and updates!

Share with us your top stories on how your organization is accelerating energy savings through efficiency upgrades, strategies, and investment!



[Better Buildings Twitter](#) with [#BBResNet](#)



[Better Buildings LinkedIn](#)

**Please send any follow-up questions
or future call topic ideas to:
bbresidentialnetwork@ee.doe.gov**